

What Is a Volunteer?

VITA/TCE

A VITA/TCE volunteer assists taxpayers in completing federal and state income tax returns and answering basic taxpayer questions.

HRA

An HRA volunteer offers free assistance to the elderly and disabled with HRA claim preparation. HRA provides a once a year payment based on directly or indirectly paid property taxes. They also answer any claimant questions about the program.

Who Do I Call For More Information About Being a Sponsor or Volunteer?

To get more information on becoming a sponsor or volunteer for the VITA/TCE or HRA volunteer programs, contact the Public Education Team at (800) 522-5665 or via email at volunteercoordinator@ftb.ca.gov.

Contacts

Franchise Tax Board Volunteer Program
(800) 522-5665
(FOR VOLUNTEERS ONLY)

Franchise Tax Board General Information
(800) 852-5711

Internal Revenue Service Volunteer Hotline
(800) 829-8482

Internal Revenue Service Hotline
(800) 829-1040

e-file Information (Franchise Tax Board)
(916) 845-0353

Automated Toll-Free Phone Service
(800) 338-0505

Assistance for persons with disabilities: We comply with the Americans with Disabilities Act. Persons with hearing or speech impairments please call TTY/TDD (800) 822-6268.

Volunteer Program

(VITA/TCE)

Volunteer Income Tax Assistance /
Tax Counseling for the Elderly

(HRA)

Homeowner and Renter Assistance

Public Education Team
Franchise Tax Board
PO Box 651
Sacramento CA 95812-0651

Place
Postcard
Stamp
Here

All assistance is free of charge.

What Is the Volunteer Program?

(VITA/TCE)

These volunteer programs help individuals with low income and/or over the age of 60 prepare their state and federal income tax returns. Assistance is available from February 1 to April 15.

VITA program helps taxpayers with basic tax returns. They specialize in assisting disabled taxpayers, those with low to limited income, and non-English speaking taxpayers.

TCE program provides free income tax assistance for middle or low-income taxpayers, giving special attention to those age 60 and older.

(HRA)

HRA program provides claim form assistance to individuals 62 or older, blind, or disabled.

Each program has its own sponsors and volunteers.

What Is a Site?

A site is a service location where taxpayers can go to ask questions or receive free trained volunteer assistance to complete their federal and state income tax returns or homeowner or renter assistance claim.

What Is a Sponsor?

A sponsor is usually a group or organization recruited to organize and manage a VITA, TCE, or HRA site within their community. This is a very valuable service.

Some sponsor organization examples are:

- Community Centers
- Libraries
- Churches
- Recreation Organizations
- Schools
- Cultural Centers
- Senior Centers

A sponsor's responsibilities may include:

- Recruiting volunteers.
- Scheduling training.
- Providing a site location.
- Scheduling volunteer work hours.
- Publicizing your program.
- Ordering supplies.
- Gathering volunteer statistics.

What Is a Site List?

A site list is a list of all sites (VITA/TCE or HRA) that provide assistance in California. We distribute the site list to legislative and congressional offices, social security offices, FTB and IRS information centers, state and locally funded information and referral centers, and other referral organizations. These organizations use the list to refer individuals who need assistance to the volunteer sites.

The site list is also available on the Internet at www.ftb.ca.gov.

Can I Be a Volunteer?

VITA/TCE

You can be a volunteer if you:

- Enjoy meeting and helping a variety of people.
- Have experience or enjoy learning about income tax preparation.
- Have some administrative or publicity experience.
- Feel comfortable using a personal computer.
- Take pride in complete and accurate work.
- Are willing to complete the IRS and state training programs.
- Can volunteer some hours from February 1 through April 15.

HRA

You can be a volunteer if you:

- Enjoy meeting and helping a variety of people.
- Want to learn about the HRA program.
- Have some administrative or publicity experience.
- Have a sincere desire to help your community.
- Are willing to attend a one-day class.
- Can volunteer some hours from July 1 through October 15.

Do You Provide Volunteer Training?

VITA/TCE

FTB and IRS provide free volunteer training. The training provides instructions for simple income tax return preparation, volunteer procedures, and volunteer report completion. Training is approximately 40 hours (32 hours of federal law and procedures, divided into four eight-hour sessions, and one eight-hour state law and procedures session). Many classes offer e-file training in conjunction with the tax law training.

We offer experienced volunteers a condensed version of the class. We also offer Internet based self-study training.

HRA

HRA volunteers receive four to eight hours of training every year depending on their experience level. Self-study is available for those who can't attend a classroom session.

Volunteer Program Interest Card

I am interested in more information regarding the following:

- ☐ Becoming a Sponsor ☐ Becoming a Volunteer
- ☐ Providing a Site ☐ Receiving the Site List

Name

E-Mail Address

Street

Organization's Name (if applicable)

City

State

ZIP Code

Home Phone

Business Phone